

Message Text

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PASS AGRICULTURE ELECTRONICALLY FOR ASSISTANT SECRETARY
HATHAWAY AND FAS SAYLOR; STR FOR STARKEY

LONDON FOR AMBASSADOR STRAUSS

E.O. 11652: GDS
TAGS: EAGR, EEC
SUBJ: POSSIBILITIES OF SECURING IMPROVED FEED GRAINS
ACCESS FROM THE EC

1. IN PREPARATION FOR AMBASSADOR STRAUSS' DISCUSSION WITH
GUNDELACH IN COPENHAGEN APRIL 7, WE HAVE REVIEWED BELOW A
NUMBER OF ALTERNATIVES FOR OBTAINING IMPROVED ACCESS FOR
FEED GRAINS FROM THE EC. THESE ALTERNATIVES ARE EXAMINED
IN TERMS OF THEIR PALATABILITY TO THE COMMUNITY, THEIR
PROBABLE VALUE TO THE U.S. AS SEEN FROM USEC, AND A ROUGH
EVALUATION OF THE RELATIVE COSTS OF THESE OPTIONS TO THE
U.S. IN TERMS OF CONCEIVABLE RECIPROCAL TRADE CONCESSIONS.

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2. WE NOTE AT THE OUTSET, HOWEVER, THAT THE CHANCES OF
SECURING IMPROVED ACCESS FOR GRAINS IN THE MTN SEEM TO US
VERY SLIM. THE DIFFERENT PERSPECTIVES, EVALUATIONS, AND
DOMESTIC POLITICAL SENSITIVITIES OF THE EC AND THE U.S. IN
THIS AREA WILL MAKE IT VERY DIFFICULT TO FIND A COMMON
GROUND. WHAT IS REGARDED BY THE COMMUNITY AS A MAJOR
CONCESSION, MAY FROM THE U.S. POINT OF VIEW BE BARELY

ACCEPTABLE - OR EVEN UNACCEPTABLE. THE EXTENT TO WHICH THE U.S. IS WILLING TO GIVE THE COMMUNITY SOME SATISFACTION ON AN INTERNATIONAL COMMODITY AGREEMENT WOULD AFFECT CHANCES OF SECURING ACCESS. IN PARTICULAR, THE COMMUNITY IS LIKELY TO DEMAND CERTAIN SUPPLY ASSURANCES IN RETURN FOR ANY

ACCESS COMMITMENT. THE MAXIMUM PRICE CONCEPT CONTAINED IN THEIR WHEAT AND FEED GRAIN PROPOSALS ILLUSTRATES THIS CONCERN. WE SEE A SLIGHT CHANCE THAT SOME LIMITED ACCESS ARRANGEMENTS COULD BE NEGOTIATED OUTSIDE OF AN INTERNATIONAL COMMODITY AGREEMENT, FOR EXAMPLE, A REDUCED LEVY QUOTA ON QUALITY WHEAT, POSSIBLY IN EXCHANGE FOR U.S. CONCESSIONS ON DAIRY. HOWEVER, U.S. PARTICIPATION IN SOME SORT OF ICA ON FEED GRAINS, WHICH WOULD TREAT THE PROBLEM OF SUPPLY ASSURANCE, IS LIKELY TO BE A PRECONDITION OF ANY EC UNDERTAKING ON ACCESS.

3. EC WILLINGNESS TO GRANT CONCESSIONS ON GRAINS ACCESS WILL ALSO BE CONSTRAINED BY THE WIDESPREAD BELIEF THAT COMMUNITY SURPLUS DISPOSAL PROBLEMS FOR WHEAT AND BARLEY WILL BECOME INCREASINGLY SERIOUS. POTENTIAL INCREASES IN YIELDS OF THESE CROPS ARE GREAT WHILE FEEDGRAIN DEMAND IS EXPECTED TO BE STAGNANT.

4. WE UNDERSTAND THAT THE VARIOUS ALTERNATIVES DISCUSSED BELOW, WITH THE EXCEPTION OF THE SELF-SUFFICIENCY RATIO
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APPROACH, WERE PRESENTED TO THE EC AS A SORT OF SHOPPING LIST AT THE EVIAN MEETING MARCH 20-21.

5. MAXIMUM LEVY: THE NEGOTIATION OF A BINDING ON VARIABLE LEVIES FOR GRAINS HAS GREAT APPEAL TO U.S. ANALYSTS, SINCE IT WOULD INVOLVE THE EC MARKET IN THE NECESSARY ADJUSTMENTS TO CHANGES IN THE WORLD SUPPLY - DEMAND SITUATION. UNFORTUNATELY, WE SEE NO POSSIBILITY THAT THE COMMUNITY WOULD CONSIDER SUCH A CONCESSION BECAUSE IT WOULD BE VIEWED AS AN INTOLERABLE VIOLATION OF THE QUOTE INTEGRITY UNQUOTE OF THE CAP.

6. LEVY-FREE OR REDUCED LEVY QUOTAS:

A. WHEAT - THE EC COMMISSION WOULD CERTAINLY RESIST THE GRANTING OF A REDUCED LEVY QUOTA FOR QUALITY WHEAT. NONETHLESS, A NUMBER OF FACTORS COULD MAKE SUCH A REQUEST ULTIMATELY NEGOTIABLE. FIRST OF ALL, BECAUSE OF ITS LIMITED NATURE IT WOULD NOT CONSTITUTE A BASIC ASSAULT ON THE CAP. LEVY-FREE OR REDUCED LEVY QUOTAS ALREADY EXIST FOR A NUMBER OF CAP PRODUCTS, FOR EXAMPLE, FROZEN BEEF FOR MANUFACTURING. THE QUANTITIES INVOLVED WOULD BE RELATIVELY

SMALL COMPARED TO THE OVERALL EC GRAINS SITUATION AND THE PRICE EFFECTS OF SUCH A QUOTA COULD PROBABLY BE ISOLATED AND WOULD NOT DISRUPT THE OVERALL EC GRAIN PRICING SYSTEM. SECONDLY, THE PROPOSAL ALREADY HAS SUPPORT AMONG CERTAIN MEMBER STATES. WE ARE TOLD THAT THE UK GOVERNMENT SUPPORTS THIS REQUEST, AND THAT THE MILLING INDUSTRIES IN THE UK, GERMANY AND POSSIBLY CERTAIN OTHER MEMBER STATES WOULD ALSO SUPPORT IT. ALSO, THIS MEASURE COULD BE TREATED AS A

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CONCESSION TO BOTH THE U.S. AND CANADA BY THE COMMUNITY.

FROM THE U.S. POINT OF VIEW, SUCH A CONCESSION COULD HAVE SOME VALUE BECAUSE THE LONG-TERM TREND APPEARS TO BE TOWARDS DECREASED USE OF NORTH AMERICAN QUALITY WHEATS BY THE EC MILLING INDUSTRY. THE IMPROVED QUALITY OF EC WHEAT AND NEW TECHNOLOGY IN MILLING ARE REDUCING THE NEED FOR IMPORTED HIGH QUALITY WHEAT. A REDUCED LEVY QUOTA FOR IMPORTED QUALITY WHEAT WOULD ARREST THIS TREND. COMMISSION IS, OF COURSE, WELL AWARE OF THIS DEVELOPMENT AND FOR THAT REASON WOULD NOT GIVE SUCH A CONCESSION EASILY.

B. CORN - A REDUCED LEVY QUOTA FOR CORN OR FEED GRAINS WOULD BE MUCH LESS PALATABLE TO THE COMMUNITY. GIVEN THE IMPORTANCE OF FEED GRAIN IMPORTS AND THEIR SUBSTITUTIBILITY FOR DOMESTIC FEEDGRAINS, WE CANNOT SEE HOW A MEANINGFUL QUOTA COULD BE ESTABLISHED WITHOUT UNDERMINING THE EC PRICE SYSTEM.

7. GUARANTEED MINIMUM PURCHASE REQUIREMENTS: THIS

APPROACH WOULD PRESUMABLY BE MORE PALATABLE THAN A REDUCED
LEVY QUOTA TO THE COMMUNITY BECAUSE IT WOULD LEAVE THE
MEANS FOR ACCOMPLISHING IT OPEN, AND BECAUSE IT COULD
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PRESUMABLY BE ADMINISTERED SO AS NOT TO DISTURB THE EC
PRICING SYSTEM.

8. FROM THE U.S. POINT OF VIEW, BOTH THE MINIMUM PURCHASE
REQUIREMENT AND THE QUOTA APPROACH SUFFER FROM THREE MAJOR
DEFECTS:

A. THEY WOULD NOT RESULT IN ANY MARKET EXPANSION, BUT
WOULD MERELY PROTECT THE EXISTING EXPORT VOLUME AND,
PROBABLY, ONLY A PORTION OF THAT. THIS COULD BE OF
CONSIDERABLE BENEFIT IN ITSELF SINCE THE TREND IS TOWARD
GREATER EC SELF-SUFFICIENCY IN TOTAL GRAINS AND THE PRE-
SENT U.S. MARKET SHARE MAY BE IN DANGER. HOWEVER, IN VIEW
OF THE EC FEARS NOTED IN PARAGRAPH 3, THE COMMUNITY WOULD
PROBABLY ACCEPT A PURCHASE REQUIREMENT OR QUOTA LEVEL
ONLY IF IT WERE SAFELY BELOW THE AVERAGE IMPORT LEVELS OF
THE PAST OR THE FORESEEABLE OPTIMAL LEVELS OF THE FUTURE.

B. THERE IS A DANGER THAT THE MINIMUMS IN THESE
AGREEMENTS COULD COME TO BE REGARDED AS MAXIMUMS, I.E.
THAT THE COMMUNITY WOULD FEEL ITSELF FREE TO PURSUE ANY
ACTIONS IT DESIRED AS LONG AS THE MINIMUMS WERE MET.

C. NEITHER OF THESE OPTIONS WOULD IN THEMSELVES ALTER
THE OVERALL GRAIN BALANCE SITUATION IN THE COMMUNITY.
THUS, FROM A GLOBAL POINT OF VIEW, THE U.S. EXPORT SITUA-
TION MIGHT NOT BE IMPROVED. MOREOVER, THESE OPTIONS
COULD WORSEN US/EC DISPUTES OVER EXPORT SUBSIDIES SINCE
THEY COULD RESULT IN A GREATER EC NEED TO EXPORT GRAINS
BY HINDERING THE MOVEMENT OF INCREASED EC PRODUCTION INTO
THE INTERNAL MARKET. (THIS PROBLEM COULD, OF COURSE, BE
MITIGATED TO THE EXTENT WE COULD ESTABLISH EFFECTIVE
DISCIPLINES ON THE USE OF EXPORT SUBSIDIES.)

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9. DESPITE THE ABOVE OBJECTIONS, WE BELIEVE THAT A MINIMUM PURCHASE REQUIREMENT (OR QUOTA) COULD STILL BE OF SOME VALUE TO THE U.S. PRIMARILY BECAUSE IT WOULD ESTABLISH ANOTHER QUOTE PRESSURE POINT UNQUOTE THROUGH WHICH U.S. INFLUENCE COULD BE BROUGHT TO BEAR. THE THREAT OF U.S. RETALIATION IN THE EVENT SUCH A COMMITMENT WERE NOT RESPECTED WOULD PERHAPS ENCOURAGE GREATER DISCIPLINE IN THE FORMULATION OF EC GRAINS POLICY - DISCIPLINE WHICH WE BELIEVE, AT LEAST GUNDELACH, THE UK AND PERHAPS A FEW OTHERS WOULD PROBABLY WELCOME.

10. BINDING OF THE SELF-SUFFICIENCY RATIO: THIS APPROACH WOULD MEET SOME OF THE OBJECTIONS MADE IN PARAGRAPH 7. IT COULD EVEN PERMIT AN EXPANSION OF GRAIN IMPORTS IF OVERALL EC DEMAND INCREASED SUFFICIENTLY AND IT WOULD AT LEAST PUT A LIMIT ON THE ADVERSE IMPACT OF EC GRAIN POLICY ON THE WORLD MARKET. (AGAIN, HOWEVER, THE EC WOULD PROBABLY ACCEPT BINDING OF THE RATIO ONLY AT A POINT CONSIDERABLY ABOVE THE EXISTING LEVEL.) FOR THESE VERY REASONS THE APPROACH WOULD PROVE MUCH MORE DIFFICULT FOR THE COMMUNITY TO ACCEPT. ALSO, THE MECHANISMS NECESSARY TO ENFORCE SUCH A COMMITMENT WOULD BE EXTREMELY DIFFICULT, IF NOT IMPOSSIBLE TO NEGOTIATE.

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11. A VARIANT ON THIS IDEA MIGHT BE TO AGREE ON A PERCENTAGE SHARING BETWEEN EC AND FOREIGN SUPPLIERS OF FEED GRAINS UNDER WHICH EC INTERNAL POLICIES WOULD BE ADJUSTED

SO THAT FOREIGN SUPPLIERS WOULD BE COUNTED ON TO SUPPLY SOME STATED PERCENTAGE OF ANY INCREASE IN CONSUMPTION OVER A BASE PERIOD. (SOME SORT OF NON-DISCRIMINATORY SUPPLY COMMITMENT WOULD BE A NECESSARY COUNTER-PART ON OUR SIDE.) THUS, THE EC WOULD COMMIT ITSELF TO A COMBINATION OF PRICE AND/OR CONSUMPTION SUBSIDY POLICIES OF THEIR CHOOSING THAT WOULD BE DESIGNED TO LET FOREIGN SUPPLIERS TAKE SOME SPECIFIED PERCENTAGE OF ANY CONSUMPTION INCREASE, WITH THE POSSIBILITY OF MORE, DEPENDING ON CURRENT CONDITIONS IN EC MARKETS. ADDITION OF THIS FEATURE TO THE QUOTA, PURCHASE REQUIREMENT, OR SELF-SUFFICIENCY RATIO (EVEN IF THEY WERE JUST ON A QUOTE BEST EFFORTS UNQUOTE BASIS) WOULD, WE ASSUME, HELP MAKE THE IDEA MORE PALATABLE IN THE U.S., IF, AS WE SURMISE, THE EC WOULD INSIST ON SETTING THE QUOTA LOW BY CURRENT STANDARDS (OR THE SELF-SUFFICIENCY RATIO HIGHER THAN CURRENT FIGURES). UNDER SUCH A SCHEME, BOTH EC AND FOREIGN SUPPLIERS WOULD HAVE AT LEAST SOME ASSURANCE THAT THEY COULD BOTH BENEFIT FROM ANY MARKET GROWTH. THIS IS MORE QUOTE ASSURANCE UNQUOTE THAN FOREIGN SUPPLIERS HAVE NOW, AND IT WOULD ALSO HELP REINFORCE THE POLICY DISCIPLINE THAT GUNDELACH IS SEEKING.

12. MONTANT DE SOUTIEN, OR SIMILAR: ALTHOUGH THE POSSIBILITY OF BINDING THE RELATIONSHIP BETWEEN WORLD PRICES AND SUPPORT PRICES WAS PUT FORTH BY THE EC ITSELF IN THE KENNEDY ROUND, IT SEEMS MUCH LESS LIKELY NOW THAT THE COMMUNITY WOULD CONSIDER IT. IN VARIOUS RECENT DISCUSSIONS OF THIS CONCEPT, COMMISSION OFFICIALS HAVE CONFIDENTIAL

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DISMISSED THE POSSIBILITY THAT THE EC, OR THE U.S. FOR THAT MATTER, WOULD ACCEPT ANY SUCH LIMITATION ON THEIR AUTHORITY TO FIX AGRICULTURAL PRICES. ALSO, THE EXTREME MONETARY FLUCTUATIONS THAT HAVE CHARACTERIZED RECENT YEARS WOULD TEND TO WORK AGAINST SUCH AN AGREEMENT AND IN A SENSE HAVE MADE THE CONCEPT OUTDATED, OR AT LEAST HOPELESSLY COMPLICATED AND PROBABLY IMPOSSIBLE TO MANAGE, IF NOT TO NEGOTIATE.

13. FEED GRAINS UTILIZATION SUBSIDIES: THIS UNORTHODOX APPROACH WOULD AIM AT EXPANDING OVERALL EC DEMAND FOR FEED GRAINS, AND THUS INDIRECTLY BENEFIT EXPORTERS. FROM THE POINT OF VIEW OF SALEABILITY WITHIN THE EC, THIS APPROACH WOULD SEEM TO OFFER SEVERAL ADVANTAGES. IT WOULD NOT VIOLATE CAP THEOLOGY. IT MIGHT GAIN INTERNAL SUPPORT FROM CONSUMERS, EC LIVESTOCK PRODUCERS AND MEMBER STATES SUCH AS THE UK AND ITALY. IT WOULD NOT HARM EC GRAIN FARMERS. ALSO, IT WOULD BE IN LINE WITH THE RECENT EC TREND TOWARDS GROWING ACCEPTANCE OF AND

INTEREST IN DIRECT SUBSIDIES AS AN AGRICULTURAL POLICY
TOOL. HOWEVER, THE EC FARM ORGANIZATIONS, EVER LEERY

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OF ALLOWING THE LEVEL OF EC FARM SUPPORT TO BECOME TOO
VISIBLE, COULD BE EXPECTED TO OPPOSE SUCH AN ARRANGEMENT.

14. THE MAJOR, AND PROBABLY OVERWHELMING OBJECTION TO
THIS APPROACH IS ITS COST. FOR EXAMPLE, ASSUMING EC
FEED USE OF GRAINS OF ABOUT 70 MILLION TONS, A \$10/TON
SUBSIDY WOULD COST THE COMMUNITY 700 MILLION DOLLARS.
AND IT IS DOUBTFUL THAT SUCH A DECREASE IN THE CONSUMER
PRICE OF FEED GRAINS WOULD SIGNIFICANTLY EXPAND DEMAND.
THUS, TO BE EFFECTIVE THE COST OF THIS PROGRAM WOULD HAVE
TO BE ENORMOUS.

15. DIRECT CONSUMER SUBSIDY FOR LIVESTOCK: AS IN THE
CASE OF A FEEDGRAINS SUBSIDY, THE MAJOR OBJECTION WOULD
BE COST. HOWEVER, IN THIS CASE THE CONNECTION TO
INCREASED FEED GRAIN USE WOULD BE EVEN MORE TENUOUS.
WHILE WE ARE NOT ABLE TO EVALUATE DEMAND ELASTICITIES,
WE SUSPECT THAT BOTH OF THESE APPROACHES WOULD HAVE TO
BE ENORMOUSLY EXPENSIVE BEFORE THEY WOULD SIGNIFICANTLY
EXPAND DEMAND FOR FEED GRAINS; AND THE EXPENSE OF THESE
PROGRAMS WOULD GIVE THE EC A CLEAR CLAIM TO MAJOR U.S.
CONCESSIONS WITHOUT ANY REAL GUARANTEE OF AN IMPROVED
SITUATION FOR U.S. GRAIN EXPORTS.

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16. WHILE WE ARE NOT VERY OPTIMISTIC ABOUT THE PROSPECTS FOR ANY OF THESE IDEAS, WE WOULD ENCOURAGE AMBASSADOR STRAUSS TO PUT THE PROBLEM TO GUNDELACH AS ONE THAT IS SIMILAR TO WHAT HE APPEARS TO WANT FOR EC CHEESE AND CANNED HAM EXPORTS TO THE U.S. IN EFFECT, HE SEEMS TO BE SEEKING SOME POLICY ACTION THAT WILL PERMIT THE EC AT LEAST TO MAINTAIN, AND HOPEFULLY INCREASE, ITS SHARE OF THE U.S. MARKET FOR THESE PRODUCTS. WE SEEK AN EQUIVAL EQUIVALENT COMMITMENT FROM THEM ON FEED GRAINS AND QUALITY WHEAT. THE PROPOSALS DISCUSSED IN PARAS 6A, 7, 9, 10, 11, 13 AND 15 OR SOME COMBINATION OF THEM OFFER AT LEAST A BASIS FOR DISCUSSION. UNLESS GUNDELACH HAS SOMETHING BETTER TO OFFER (AND IT WOULD SURPRISE US IF HE DID), THIS MIGHT BE WORTH A TRY. MORRIS

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